



Secretariat

ST/IC/1994/16
4 May 1994

INFORMATION CIRCULAR

To: Members of the staff

From: The Director of Personnel

Subject: STATUS REPORT, REQUEST FOR PAYMENT OF DEPENDENCY
BENEFITS AND HOUSING ASSISTANCE INFORMATION*

1. All staff members on the Headquarters payroll, other than short-term staff, were required up until 1990 to complete the annual status report and request for payment of dependency benefits (form P.84). For the same purpose, staff members were requested to complete a different questionnaire for the fiscal year 1991.
2. As a result of restructuring in the Office of Human Resources Management in 1993, which included the integration of the activities of the Allowances and Benefits Unit with those of the Staff Administration and Monitoring Service, no dependency status report forms/questionnaires for the years 1992-1993 could be distributed to the staff.
3. With the introduction of the Integrated Management Information System (IMIS) and the information generated from its database, a new form has been designed, which covers the fiscal years 1992 and 1993 (form P.84 (1-94)).
4. However, since the IMIS data are derived from the database of the former Allowances and Benefits Unit, to which only minor updates were made after August 1993, some information may be found to be incorrect and/or incomplete. In filling in the form, all staff members are therefore required to review, correct and supplement all the data provided.
5. It should be noted that the implementation of IMIS in New York requires additional data, such as the birth date, nationality and residence status (i.e. "with staff member", "away", "away on education grant" and "with other parent") for all household members, regardless of their dependency status. It is also brought to the attention of the staff that, while all staff members'

* Personnel Manual index No. 3340.

index numbers have been converted into IMIS, the new system requires a similar identification number for all persons regardless of whether they are applicants, staff members' dependants or household members. Household members have therefore been assigned index numbers for the first time. Those numbers are shown on the P.84 (1-94) form and should be retained by staff members for future reference.

6. Because dependency benefits could not be reviewed on time for the years 1992-1993 for the reasons stated above, staff may claim retroactively, effective from 1 January 1992, a benefit for a spouse, child or secondary dependant. Similarly, if staff continued receiving those benefits from 1992 until the present, but upon review do not meet the criteria established for receipt of benefits as stated in the paragraphs below, those benefits will be recovered from their salaries.

7. The P.84 (1-94) form will be distributed shortly by executive officers to all staff members. Additional blank P.84 (1-94) forms will be provided for those staff members who are currently not registered in IMIS. The form should be completed in accordance with paragraphs 4 and 5 above and returned immediately to the respective personnel officer in the Office of Human Resources Management. Failure to fill out the P.84 (1-94) form will result in discontinuance of the benefits.

Dependent spouse

8. A dependent spouse of a staff member as defined in staff rule 103.24 (a) is one who has no occupational earnings or whose gross occupational earnings do not exceed the earnings limit established for this purpose in rule 103.24. This earnings limit is the gross salary of the lowest entry level of the General Service salary scale applicable at the spouse's place of work. In addition, in the case of a spouse of a staff member in the Professional category and above, the spouse's occupational earnings may not exceed the gross salary of a staff member at G-2, step 1 level, for New York, for recognition as a dependent spouse.

9. For New York, the earnings limit for 1992 was \$25,578 gross per year, for 1993, \$26,499 and for 1994 it is \$27,328 gross per year (the gross salary in effect on 1 January of the year concerned for a staff member at G-2, step 1 level). For other duty stations, the earnings limit is equivalent to the lowest entry level of the United Nations General Service salary scales, effective 1 January 1992, 1993 or 1994, as appropriate, for the duty station concerned.

10. Staff in the General Service and related categories will receive for a dependent spouse the spouse allowance established for the duty station. Staff in the Professional category and above and in the Field Service category will receive a dependency benefit in the form of salary and post adjustment at the dependency rates. The amount of this benefit is the difference between salary and post adjustment at the single rate and salary and post adjustment at the dependency rates.

11. When the spouse's occupational earnings exceed the established earnings limit, no dependency benefit (spouse allowance or dependency rates of salary and

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post adjustment) will be paid in his/her respect. However, an adjusted dependency benefit may be paid when the spouse's gross occupational earnings are less than the sum of the earnings limit and the appropriate dependency benefit. The adjusted benefit will be equal to the amount by which the sum of the earnings limit and the appropriate dependency benefit exceeds the spouse's gross occupational earnings.

Dependent children

12. As defined in staff rule 103.24 (b) and paragraph 3 of administrative instruction ST/AI/278/Rev.1 on the definition of dependency status, the following children may be eligible for dependency status:

- (a) A staff member's natural child;
- (b) A staff member's legally adopted child;
- (c) A staff member's stepchild, if residing with the staff member;
- (d) If legal adoption of the child is not possible because there is no statutory provision for adoption or any prescribed court procedure for formal recognition of customary or de facto adoption in the staff member's home country or country of permanent residence, then a child in respect of whom the following conditions are met:

- (i) The child resides with the staff member;
- (ii) The staff member can be regarded as having established a parental relationship with the child;
- (iii) The child is not a brother or sister of the staff member;
- (iv) The number of children for which dependency benefits are being claimed by the staff member under this subparagraph does not exceed three.

13. For any of the above-mentioned children to be recognized as a staff member's dependent child, the following requirements must be met:

- (a) (i) The child must be under the age of 18 years;
- (ii) If the child is 18 years of age or older but under the age of 21 years, he/she must be in full-time attendance at a school or university (or similar institution);
- (b) The staff member must provide main and continuing support for the child.

The age and school attendance requirements indicated under (a) above will be waived if a child is physically or mentally incapacitated for substantial gainful employment, either permanently or for a period expected to be of long duration.

14. A children's allowance is payable for each dependent child of a staff member. In the case of staff in the General Service and related categories, the amount of the children's allowance is established for each duty station. In the case of staff in the Professional category and above and in the Field Service category, the amount of the children's allowance is that established in staff regulation 3.4. However, in the case of a staff member in the Professional category and above or in the Field Service category who has no dependent spouse, the staff member will receive for the first child, in lieu of the children's allowance, the dependency rates of salary and post adjustment. This benefit is granted subject to paragraph 15 below.

15. For payment of a dependency benefit in respect of a child in the form of salary and post adjustment at the dependency rates, staff rule 103.17 (b) (ii) requires that the staff member provide substantial and continuing support for one or more of his/her children. For the provision of such support to be recognized, the sum of the staff member's (a) gross salary less the difference between the single and dependency rates of net salary, and (b) post adjustment at the single rate, must not be less than two thirds of the gross occupational earnings of his/her spouse. If this requirement is not met, the staff member will receive salary and post adjustment at the single rate and dependency allowance for the child.

16. If a staff member or his/her spouse receives a dependency benefit in the form of a government grant in respect of a child, the amount is subtracted from any dependency benefit payable by the United Nations in respect of that child. The amount of any such grant received in respect of each child should be indicated in section IV of the P.84 (1-94) form.

17. It is the staff member's responsibility to give written notice to his/her personnel officer if his/her child marries. If the staff member continues to claim the child as a dependant, documentary evidence satisfactory to the Secretary-General is required under paragraph 19 below in order for the child to continue to be recognized as his/her dependant.

18. It is also the staff member's responsibility to give written notice to his/her personnel officer if his/her child ceases to be in full-time attendance at an educational institution. The staff member is required to submit a certificate of school attendance for his/her dependent child between the ages of 18 and 21 at the end of each school year, except for staff members who are entitled and submit a yearly education grant claim. While an effort will be made to remind staff members of this obligation, failure to submit the certificate of school attendance will result in discontinuance of the dependency benefits and in recovery of any overpayment. The dependency status of a child between the ages of 18 and 21 continues through a period of vacation only if the child enrolls for full-time attendance after the vacation. Otherwise, the dependency status ceases as of the last day of attendance of the preceding school term.

19. In addition to the staff member's certification that he/she provides main and continuing support for the child, documentary evidence of such support satisfactory to the Secretary-General will always be required if a child:

(a) Does not reside with the staff member because of divorce or legal separation;

(b) Is married;

(c) Is regarded as a dependent child under paragraph 3 (d) of administrative instruction ST/AI/278/Rev.1.

Secondary dependant

20. A dependency allowance is payable in respect of only one secondary dependant. It is not payable for a secondary dependant if the staff member is already receiving dependency benefits in respect of a dependent spouse. A secondary dependant may be the father, mother, brother or sister of the staff member of whose financial support the staff member provides one half or more, and, in any case, at least twice the amount of the dependency allowance. In the case of a brother or sister, he/she must be under the age of 18 or, if in full-time attendance at a school or university (or similar educational institution), under the age of 21. However, if the brother or sister is either physically or mentally incapacitated for substantial gainful employment, either permanently or for a period expected to be of long duration, the requirements as to age and school attendance will be waived.

21. Staff members are responsible under the Staff Rules for promptly notifying the Secretary-General in writing of any changes in their marital or dependency status. Notification of changes that occur after the P.84 (1-94) form has been returned to the personnel officer, and that could not have been foreseen at the time, should also be made in writing to the staff member's personnel officer.

Housing assistance

22. Rental deductions will be effected when staff members receive housing assistance including housing provided by the Organization, by a Government or by a related institution free of charge or at rents substantially lower than the average rents used in calculating the post adjustment index for the duty station. The purpose of these deductions is to maintain equity in the application of the post adjustment system among staff members of the duty station. Staff benefiting from this type of financial assistance should therefore reply "yes" to the question in section VI of the P.84 (1-94) form.

23. Staff currently receiving a United Nations rental subsidy because their rented accommodations cost significantly more than the average for their duty station should reply in the negative to the same question.

Designation of beneficiary

24. Staff members are required under staff rule 112.5 to notify the Secretary-General of any revocations or changes of beneficiaries. A beneficiary for the purposes of the rule is designated at the time of appointment on the "Designation, change or revocation of beneficiary" form (P.2 [10.83]). Staff members, particularly those who made the designation at the time of their appointment many years ago, are urged to review through their personnel officer

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whether their original designation is still correct and to make any changes thereto if they wish.

25. It is also suggested that staff members take this opportunity to examine their original designation of beneficiaries for the United Nations Joint Staff Pension Fund and for the Group Life Insurance Plan. Notification of changes should be sent to the Secretary of the Pension Fund, room S-765, or to the Insurance Section, room S-2755, as appropriate.

26. The present circular supersedes information circular ST/IC/1992/12 of 26 February 1992.
